

011 - CLERK OF THE BOARD

Operational Summary

Mission:

The Mission of the Clerk of the Board of Supervisors is to provide the County and its citizens easy access to information and guidance to facilitate fair, equitable and open participation in the decision and policy making of Orange County government.

Strategic Goals:

- Facilitate the decision and policy making of Orange County government.
- Ensure the assessment appeals process is fair, timely and equitable; and promote public understanding of the process.
- Ensure records are maintained, legislative history of the County is preserved and documents are readily available to our clients.

Key Outcome Indicators:

Performance Measure	2003 Business Plan Results	2004 Business Plan Target	How are we doing?
PERCENT OF ACCURATE BOARD OF SUPERVISORS AGENDA TITLES. What: Measurement of COB's accuracy and training. Why: Indicator of COB's compliance with Brown Act and identifies areas requiring training.	98.5% of published agenda titles were accurate with no errors.	99.25% of agenda titles are published with no errors.	COB has consistently maintained a high level of accuracy.
PERCENT OF ACCURATELY COMPLETED AND TIMELY FILED ASSESSMENT APPEALS APPLICATIONS. What: Indicator of taxpayers' and agents' understanding of applications and process. Why: Measures success of the COB's training and outreach efforts to the public and tax agents.	88.6% of applications were completed accurately and timely filed.	85% of applications accurately completed and timely filed.	Litigation regarding 2% cap on annual property tax value increase has created public confusion, resulting in more inaccurate applications during the last two filing periods.
PERCENT OF ASSESSMENT APPEAL CLAIMS DECIDED OR WAIVED WITHIN 2 YEAR DEADLINE. What: Indicator of success managing caseload to ensure required actions are taken before legal deadline. Why: Assesses whether policies and procedures result in processing appeals within the statutory deadline.	98.2% of 2002 appeals have been resolved or waivers received. Cases in litigation included in unresolved. COB anticipates similar results for appeals filed in 2003.	100% of appeals resolved or waivers filed, excluding cases in litigation.	COB meeting goal due to manageable number of filings and quality tracking of database information and appeals.

At a Glance:

Total FY 2003-2004 Actual Expenditure + Encumbrance:	2,398,475
Total Final FY 2004-2005 Budget:	2,526,209
Percent of County General Fund:	0.10%
Total Employees:	33.00

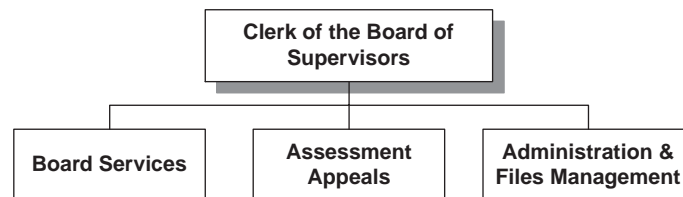
Key Outcome Indicators: (Continued)

Performance Measure	2003 Business Plan Results	2004 Business Plan Target	How are we doing?
PERCENT OF ASSESSMENT APPEALS HEARINGS HELD OR SCHEDULED WITHIN ONE YEAR OF FILING. What: Indicator of efficiency in processing and scheduling appeals. Why: Measures COB's success in timely resolution of appeals & reduces filings in following filing period.	100% of 2003 filings held initial hearings within one year, excluding those with applicant waivers filed.	95% of hearings scheduled within one year, excluding filings with applicant waivers.	With filings remaining at a manageable level for several years and usage of automation, COB has been successful in providing this level of client service. However, with increased filings, ability to provide this level of service may decline.
RESULTS OF CUSTOMER SATISFACTION SURVEYS. What: Measurement of success in meeting clients' needs. Why: Assesses COB's success in meeting the needs of its customers in a professional and courteous manner.	COB has received favorable ratings from 95%-100% of respondents.	97% rating of services as good or outstanding.	COB has received favorable ratings from 95%-100% of its clients.

FY 2003-2004 Key Project Accomplishments:

- Completed implementation of E-Agenda enterprise automation
- Expanded use of E-File Assessment Appeals online application. Completed assessment appeals database conversion to new operating system
- Continued community outreach workshops and expanded training program for County agencies/departments

Organizational Summary



COB - EXECUTIVE - Provides leadership and vision, management oversight and direction to all COB functions; performs administrative functions including budget preparation and monitoring, strategic financial projections, human resources, legislative analysis, prepares business plan and monitors progress in meeting goals and performance indicators.

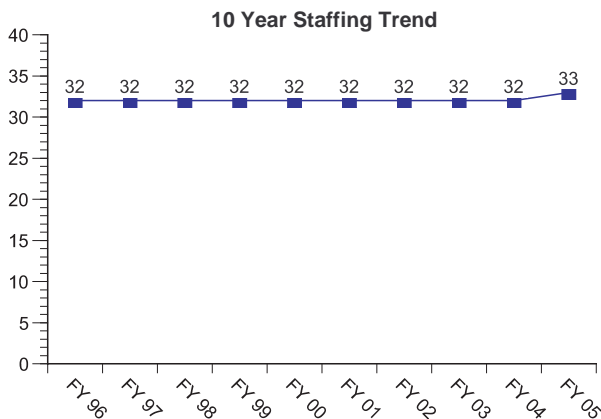
BOARD SERVICES - Prepares and publishes agendas for Board of Supervisors and other authorities in accordance with legal requirements for public meetings; records and publishes actions taken by the Board; maintains official rosters of Boards, Commissions and Committees; processes legal publications,

postings and notices; receives and administers bid openings for County projects; administers oaths of office for various elected and appointed officials and employees; serves as filing officer for Statement of Economic Interest forms; receives and processes claims, summons and complaints against the County.

ASSESSMENT APPEALS - Receives and processes assessment appeal applications; schedules hearings in accordance with legal requirements; prepares minutes and processes actions of the Appeals Boards and Hearing Officers; provides assistance and education on the assessment appeals process to the general public and professional groups through workshops, brochures and the Internet.

ADMINISTRATION/FILES MGT - Provides files management for all records that the Clerk of the Board is required to maintain; assists County staff and the public with research and retrieval of information; provides technical knowledge and coordination in development and implementation of automation projects; provides end-user system support services; performs purchasing, petty cash and payroll functions for COB and the Board of Supervisors Offices.

Ten Year Staffing Trend:



Ten Year Staffing Trend Highlights:

- Increase to staffing in FY 95-96 due to transfer of assessment appeals intake function from the Assessor. COB has been able to maintain level staffing since that time, largely due to automation of previously labor-intensive activities. Increase of 1 position in 04-05 due to transfer from CEO of rotating position to support Board Chairman.

Final Budget and History:

Sources and Uses	FY 2002-2003 Actual Exp/Rev	FY 2003-2004 Budget As of 6/30/04	FY 2003-2004 Actual Exp/Rev ⁽¹⁾ At 6/30/04	FY 2004-2005 Final Budget	Change from FY 2003-2004 Actual	
					Amount	Percent
Total Positions	-	32	32	33	1	3.13
Total Revenues	7,635	23,800	14,501	99,300	84,799	584.77
Total Requirements	2,282,643	2,392,478	2,398,816	2,526,209	127,393	5.31
Net County Cost	2,275,008	2,368,678	2,384,315	2,426,909	42,594	1.79

(1) Amounts include prior year expenditures and exclude current year encumbrances. Therefore, the totals listed above may not match Total FY 2003-04 Actual Expenditure + Encumbrance included in the "At a Glance" section.

Detailed budget by expense category and by activity is presented for agency: Clerk of the Board in the Appendix on page 445.

Budget Summary

Plan for Support of the County's Strategic Priorities:

Through use of automation developed and implemented over the past few years, COB has been able to reduce ongoing operational costs and maintain level staffing. COB will continue to pursue cost savings and revenue enhancements where efficient and cost-effective. Ideas implemented include reducing printing costs by distributing materials electronically, sale of County-developed software and scheduling changes to reduce the number of assessment appeal board hearings required.

Changes Included in the Base Budget:

Transfer of position from CEO budget that supports Board Chairman's office.

Funding added from AB589 - State Property Tax Administration Grant, to fill 2 existing Assessment Appeal positions to handle increased filings and to support the additional workload expected as a result of new/enhanced activities by the Assessor in the AB589 contract. During the FY 2004-05 Public Budget Hearings, the Board of Supervisors added \$10,000 for preventative maintenance.

Highlights of Key Trends:

- COB will continue to pursue new automation and enhancements to existing systems when it is cost effective and provides greater access to information and services.
- COB will continue to review its workflow to increase efficiencies and eliminate any duplicative or unnecessary work products. Assessment Appeal filings have

remained at a manageable level for several years, but in 03-04 there was a 38% increase over the prior year's annual filing period. With continued automation efforts and AB 589 funding of two positions, we are positioned to handle this increase in workload. However, workload could be further impacted by economic, legislative and legal factors.

Budget Units Under Agency Control

No.	Agency Name	COB - Executive	Board Services	Assessment Appeals	Administration/Files Mgt	Total
011	Clerk Of The Board	357,748	554,593	931,813	682,055	2,526,209
	Total	357,748	554,593	931,813	682,055	2,526,209

011 - CLERK OF THE BOARD

Summary of Final Budget by Revenue and Expense Category:

Revenues/Appropriations	FY 2002-2003 Actual Exp/Rev	FY 2003-2004 Budget As of 6/30/04	FY 2003-2004 Actual Exp/Rev ⁽¹⁾ At 6/30/04	FY 2004-2005 Final Budget	Change from FY 2003-2004 Actual	
					Amount	Percent
Charges For Services	\$ 5,130	\$ 20,700	\$ 14,007	\$ 96,200	\$ 82,193	586.80%
Miscellaneous Revenues	2,505	3,100	494	3,100	2,606	527.47
Total Revenues	7,635	23,800	14,501	99,300	84,799	584.77
Salaries & Benefits	1,625,357	1,810,077	1,810,076	1,965,123	155,047	8.57
Services & Supplies	666,547	581,784	582,125	562,424	(19,701)	-3.38
Services & Supplies Reimbursements	(7,463)	(6,000)	0	0	0	0.00
Fixed Assets	0	8,216	8,215	0	(8,215)	-100.00
Intrafund Transfers	(1,799)	(1,599)	(1,600)	(1,338)	262	-16.36
Total Requirements	2,282,643	2,392,478	2,398,816	2,526,209	127,393	5.31
Net County Cost	\$ 2,275,008	\$ 2,368,678	\$ 2,384,315	\$ 2,426,909	\$ 42,594	1.79%

(1) Amounts include prior year expenditures and exclude current year encumbrances. Therefore, the totals listed above may not match Total FY 2003-04 Actual Expenditure + Encumbrance included in the "At a Glance" section.

Final Budget Summary of Clerk of the Board - Executive:

Revenues/Appropriations	FY 2002-2003 Actual Exp/Rev	FY 2003-2004 Budget As of 6/30/04	FY 2003-2004 Actual Exp/Rev ⁽¹⁾ At 6/30/04	FY 2004-2005 Final Budget	Change from FY 2003-2004 Actual	
					Amount	Percent
Charges For Services	\$ 5,130	\$ 0	\$ 7,375	\$ 0	\$ (7,375)	-100.00%
Miscellaneous Revenues	2,505	0	168	0	(168)	-100.00
Total Revenues	7,635	0	7,543	0	(7,543)	-100.00
Salaries & Benefits	332,746	351,550	366,056	304,518	(61,538)	-16.81
Services & Supplies	123,536	88,269	133,264	53,230	(80,034)	-60.06
Total Requirements	456,282	439,819	499,320	357,748	(141,572)	-28.35
Net County Cost	\$ 448,647	\$ 439,819	\$ 491,777	\$ 357,748	\$ (134,029)	-27.25%

Final Budget Summary of Board Services:

Revenues/Appropriations	FY 2002-2003 Actual Exp/Rev	FY 2003-2004 Budget As of 6/30/04	FY 2003-2004 Actual Exp/Rev ⁽¹⁾ At 6/30/04	FY 2004-2005 Final Budget	Change from FY 2003-2004 Actual	
					Amount	Percent
Charges For Services	\$ 0	\$ 0	\$ 6,632	\$ 0	\$ (6,632)	-100.00%
Miscellaneous Revenues	0	0	326	0	(326)	-100.00
Total Revenues	0	0	6,958	0	(6,958)	-100.00
Salaries & Benefits	324,653	333,886	329,815	398,154	68,339	20.72
Services & Supplies	210,928	181,026	127,583	157,777	30,194	23.67

Final Budget Summary of Board Services:

Revenues/Appropriations	FY 2002-2003 Actual Exp/Rev	FY 2003-2004 Budget As of 6/30/04	FY 2003-2004 Actual Exp/Rev ⁽¹⁾ At 6/30/04	FY 2004-2005 Final Budget	Change from FY 2003-2004 Actual	
					Amount	Percent
Services & Supplies	(7,463)	(6,000)	0	0	0	0.00
Reimbursements						
Fixed Assets	0	8,216	8,215	0	(8,215)	-100.00
Intrafund Transfers	(1,799)	(1,599)	(1,600)	(1,338)	262	-16.36
Total Requirements	526,319	515,529	464,012	554,593	90,581	19.52
Net County Cost	\$ 526,319	\$ 515,529	\$ 457,055	\$ 554,593	\$ 97,538	21.34%

Final Budget Summary of Assessment Appeals:

Revenues/Appropriations	FY 2002-2003 Actual Exp/Rev	FY 2003-2004 Budget As of 6/30/04	FY 2003-2004 Actual Exp/Rev ⁽¹⁾ At 6/30/04	FY 2004-2005 Final Budget	Change from FY 2003-2004 Actual	
					Amount	Percent
Charges For Services	\$ 0	\$ 15,000	\$ 0	\$ 83,000	\$ 83,000	0.00%
Total Revenues	0	15,000	0	83,000	83,000	0.00
Salaries & Benefits	607,509	587,303	652,248	694,715	42,467	6.51
Services & Supplies	312,855	217,763	308,722	237,098	(71,624)	-23.20
Total Requirements	920,364	805,066	960,970	931,813	(29,157)	-3.03
Net County Cost	\$ 920,364	\$ 790,066	\$ 960,970	\$ 848,813	\$ (112,157)	-11.67%

Final Budget Summary of Administration/Files Management:

Revenues/Appropriations	FY 2002-2003 Actual Exp/Rev	FY 2003-2004 Budget As of 6/30/04	FY 2003-2004 Actual Exp/Rev ⁽¹⁾ At 6/30/04	FY 2004-2005 Final Budget	Change from FY 2003-2004 Actual	
					Amount	Percent
Charges For Services	\$ 0	\$ 5,700	\$ 0	\$ 13,200	\$ 13,200	0.00%
Miscellaneous Revenues	0	3,100	0	3,100	3,100	0.00
Total Revenues	0	8,800	0	16,300	16,300	0.00
Salaries & Benefits	360,450	537,338	461,958	567,736	105,778	22.90
Services & Supplies	19,229	94,726	12,556	114,319	101,763	810.49
Total Requirements	379,679	632,064	474,514	682,055	207,541	43.74
Net County Cost	\$ 379,679	\$ 623,264	\$ 474,514	\$ 665,755	\$ 191,241	40.30%